Adam Crenshaw Metropolitan Transportation Commission

SPOC Workshop San Carlos May 30, 2017



What is the TIP?

- 4 Year Program of Projects
- Clearinghouse of Project Information and Programming Data



Key Milestones that Require TIP Programming

- Scheduling a Field Review
- Final Caltrans Review of Environmental Documents
- Obligation of Funding



Planning Context of the TIP

- > TIP projects must be consistent with the Regional Transportation Plan (RTP)
 - Description
 - Cost
 - Completion Year
- TIP projects must be consistent with the Regional Transportation Air Quality Conformity Analysis for the RTP and the TIP
 - Description
 - Analysis Year



Grouped Listings

> Multiple exempt projects included in one TIP listing



Grouped Listings – Caltrans Managed Programs

- > HBP, HSIP, SHOPP
- In grouped listing for programming purposes
- Individual listings for monitoring and project-level air quality purposes



TIP Revisions

Administrative Modifications

- Relatively small funding changes and specific non-funding changes allowed per http://www.dot.ca.gov/hq/transprog/federal/fedfiles/ res_publications/rev_amend_proc.pdf
- Final approval delegated to MTC
- Shorter approval timeline



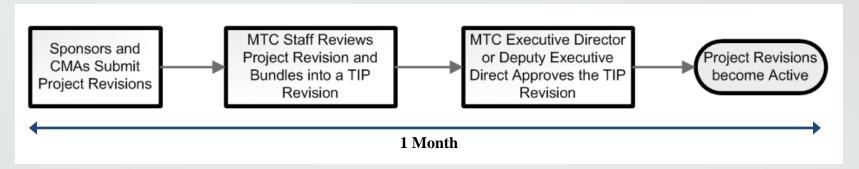
TIP Revisions

- Amendments
- Changes other than those allowed in administrative modifications per http://www.dot.ca.gov/hq/transprog/federal/fedf iles/res_publications/rev_amend_proc.pdf
- Final approval by FHWA and FTA
- Longer approval timeline

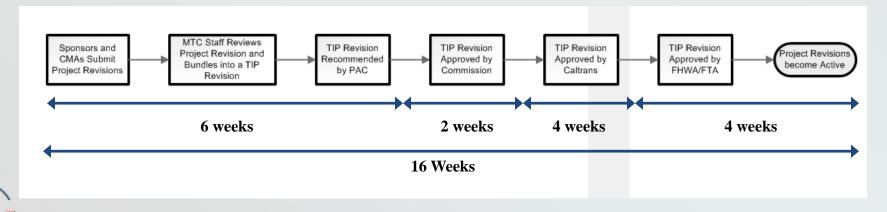


TIP Revisions

> For Administrative modifications



> For Amendments



Contacts

> TIP and FMS

Adam Crenshaw (415) 778-6794 acrenshaw@mtc.ca.gov Karl Anderson (415) 778-6645 kanderson@mtc.ca.gov



Using FMS

Adam CrenshawMetropolitan Transportation Commission

SPOC Workshop San Carlos, CA

May 30, 2017



Using FMS - Overview

- > FMS User Accounts
- > TIP Revision Process
- > FMS Universal Application (UA)
- Project Searches
- Reports



FMS - User Accounts

Creating an Account

 Links to Account Creation are on the FMS Home page (http://fms.mtc.ca.gov/fms/home.ds) and the Log In page



FMS Log In Page

FMS	<u>Log in</u>
Project Mar	nager Report Manager <u>H</u> elp
Log in Use this form	to log in
* Email	
* Password	
	* Required fields
	Sign in
	Don't have an account? Click here to create one now. Forgot your password?

 MTC Staff will Review the account, assign the appropriate privileges and restrictions, and activate the account



FMS - User Accounts

Privileges and Restrictions

- Public Users
 - Can search for projects and view project information
- Local Road and Highway Sponsors
 - Access and edit their own projects through UA
- CMAs
 - Access and edit projects for their own county through UA and submit revisions
- Transit Operators
 - Access and edit their own projects through UA and submit revisions



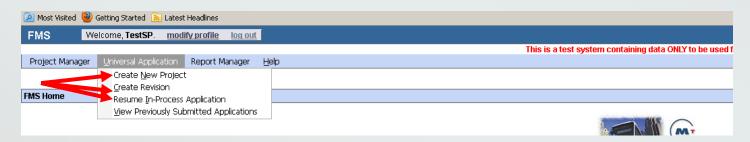
TIP Revision Process – Lifecycle of a Project

- New Project
- Revised Project
- Archived or Deleted Project



TIP Revision Process – Lifecycle of a Project Revision

- New Project Revisions
 - New Projects
 - Universal Application >> Create New Project
 - Revisions to Existing Projects
 - Universal Application >> Create Revision



- Revisions begin with an "In Process" status
 - They can be accessed through Universal Application >> Resume In Process Application



TIP Revision Process – Lifecycle of a Project Revision

Submitting a Revision

- MTC Staff reviews Project Revisions
 - Decline Project Revision is returned to the sponsor for edits
 - Accept Project Revision moves on to the TIP Revision stage
- Once accepted Project Revisions are bundled into a TIP Revision
 - The revision will be included in an Administrative Modification or a Formal Amendment
 - Given a TIP Revision Number (e.g. 2017-03)
 - Reviewed by MTC management and executive staff



TIP Revision Process – Lifecycle of a Project Revision

- Accessibility of Project Revisions by Status
 - IN PROCESS
 - Viewable in Project Search
 - Accessible and editable in UA for users with the appropriate privileges
 - SUBMITTED and ACCEPTED
 - Viewable in Project Search but not UA
 - PROPOSED and ACTIVE
 - Viewable but not editable through Project Search and UA
 - Appropriate users may create new revisions using PROPOSED or ACTIVE versions as a base



Project Detail Tab

Project Name Sponsor

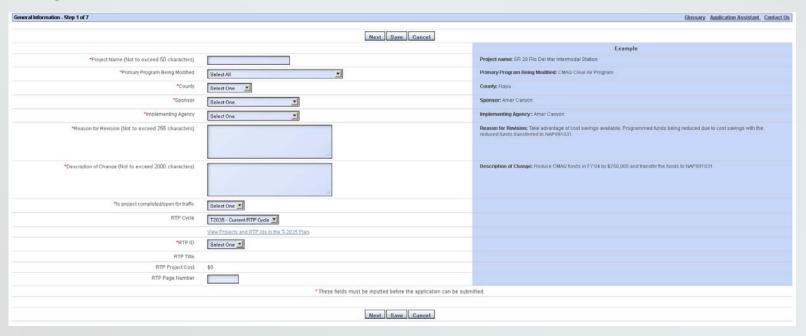
Primary Program Implementing Agency

County Reason for Revision

Description of Change

Project Complete Flag

RTP ID





Project Description Tab

Submode

Submode Percentage

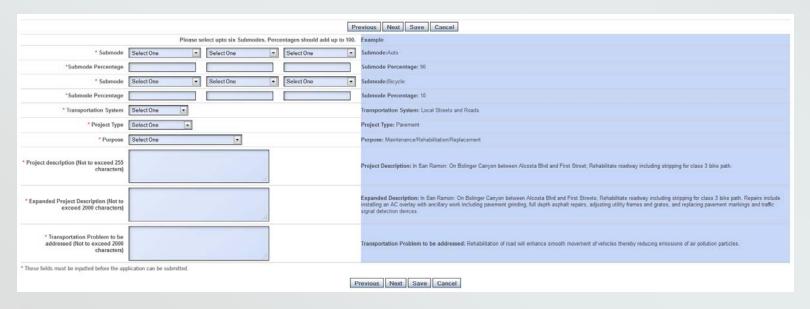
Transportation System Project Description

Project Type

Purpose

Expanded Description

Transportation Problem Addressed





Project Description Tab – Issues to be aware of

- Sub-Mode
 - Enter sub-modes in descending order of priority

Purpose

- Expansion Project adds capacity to the existing system
- Maintenance, Rehab, Replacement Project preserves existing facilities
- Operations Project funds the administration and operations of agencies
- System Management/Travel Demand Management Project promotes more efficient use of existing facilities
- Other Option of last resort



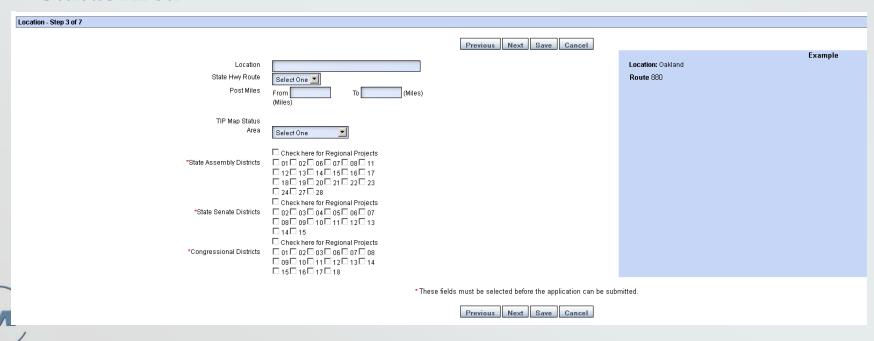
- Project Description Tab Issues to be aware of
 - Project Description
 - Include the name of the jurisdiction
 - Include the project limits
 - Include the description of the work being done
 - Example City: Street A from Road 1 to Road 2: Rehabilitate roadway, replace curbs and gutters, and patch sidewalks



Location Tab

Required Fields – State Assembly Districts, State Senate Districts, Congressional Districts

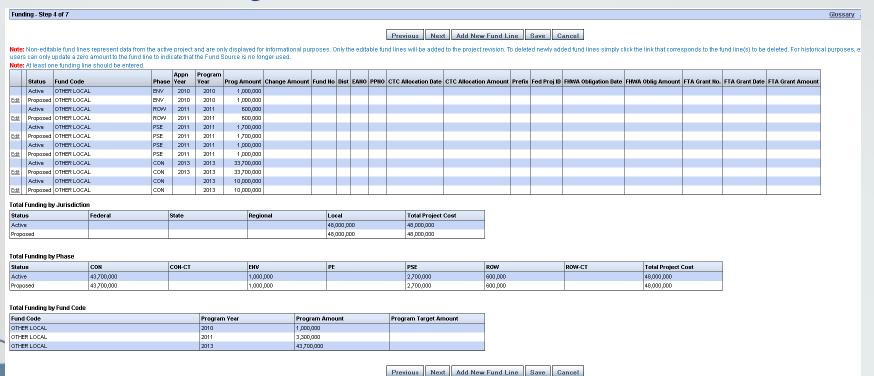
Optional Fields - Location, State Route, Post Miles, TIP Mapper Status Area



Funding Tab

Add a New Fund Line Edit an Existing Fund Line

Remove funds from a project

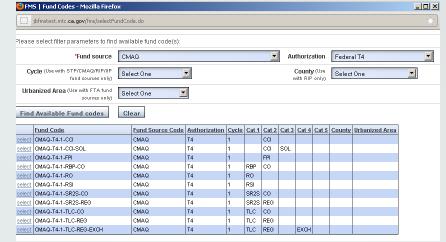


Funding Tab – Add New Fund Line



- Fund Code
- Common issues finding fund codes
 - Regional Measure funds are under the "Bridge Tolls" source
 - Other State and Other Federal funds are options of last resort.

If they must be used, include the full fund source in Reason for Revision and the Expanded Project Description





Funding Tab – Add New Fund Line



Phase

- Most Common PE, ROW, CON
- Other Phases
 - PSE and ENV for STIP and ATP funded project only
 - ROW-SUP and CON-CE are Caltrans support for Right-of-Way and Construction phases



Funding Tab – Add New Fund Line



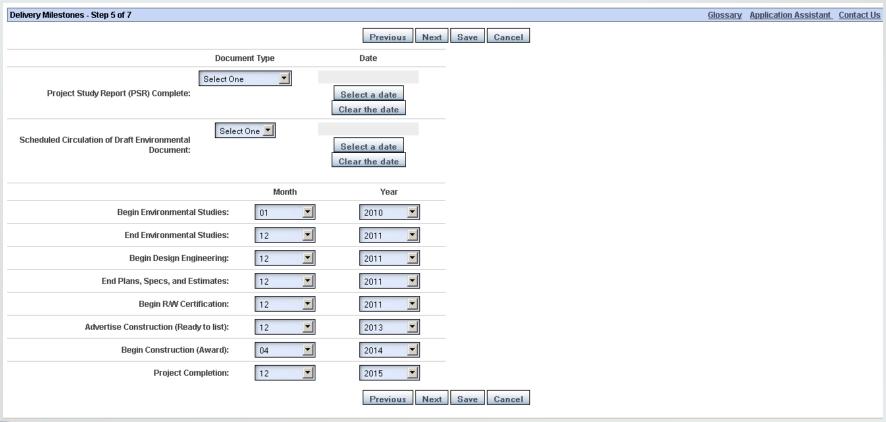
- Apportionment Year
- Program Year
 - Local match funds must be programmed in the same year and phase as the federal funds they are matching
- Program Amount
 - Use positive whole dollar amounts only
 - Do not round to thousands or millions of dollars



- Funding Tab Editing Existing Fund Lines
 - Same functionality as adding new fund lines
- Funding Tab Removing funding from a project
 - The "Delete" link will only be displayed next to fund lines that you are allowed to delete
 - Once fund lines have been included in an approved revision you must zero out the fund line to remove the funds

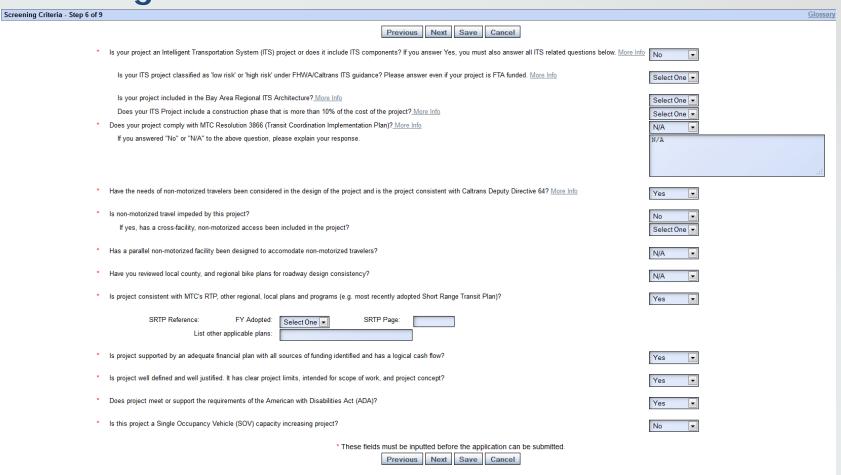


Delivery Milestones Tab



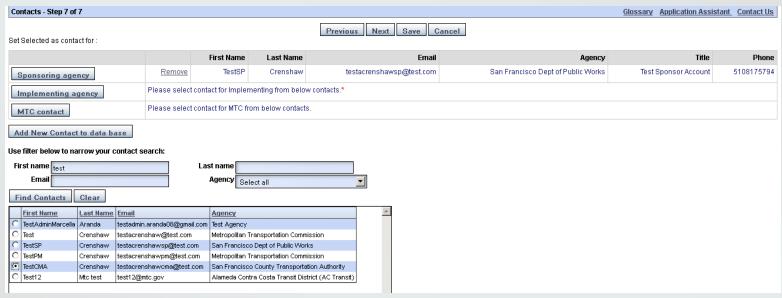


Screening Criteria Tab





Contact Information Tab



- Click the radio button next to the appropriate contact
- Then click the Sponsor Agency, Implementing Agency, or MTC Contact button to assign the contact



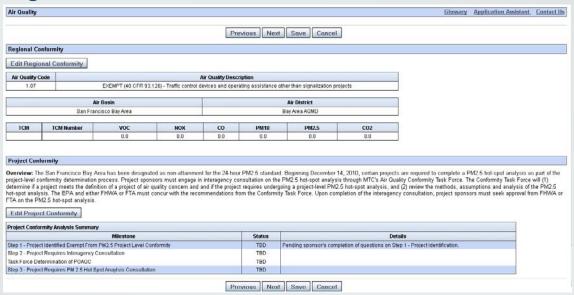
Project Documents Tab



- Do not use this tab for uploading Air Quality Conformity related documents
- Do not create a new Revision only to upload a document –
 Contact MTC if only an upload is needed



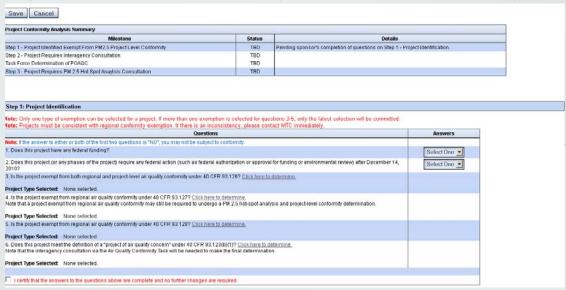
Air Quality Tab



- Regional Conformity Only editable by MTC staff
- Project Conformity Needs to be completed by the Project Sponsor



Air Quality Tab – Edit Project Conformity



- Answer Questions 1 6
- Click the checkbox and save the entry
- FMS or an MTC Air Quality Coordinator will notify users regarding any further actions that are needed



Review Tab

General Inrmation - Step 1:				Edit Gene	eral Infor	nation														
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											310	1-110026								
Version	0										1									
Project name		East Side Community Transit Connectivity Imprvmts										East Side Community Transit Connectivity Imprvmts								
Primary Program Being Modified	Transportatio	n for Li	vable C	ommunities (TLC)							Tra	ansportation for Liv	rable Commun	ities (T	LC)					
County	SM										SM	1								
Sponsor	San Carlos										Sa	n Carlos								
Implementing Agency	San Carlos										Sa	n Carlos								
Reason for Revision		This field is displayed in red because what has been entered here is different from what was entered in this field in the prior version																		
Description of Change		This field is displayed in red because what has been entered here is different from what was entered in this field in the prior version																		
Is project completed/open for traffic	No										No									
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- Side-by-side comparison of the current revision and the previous version – changes are shown in red
- Fund lines from current revision are shown as Proposed and prior versions are shown as Active
- Revisions may be saved or submitted based on privileges

FMS - Project Searches

Uses for Project Searches

- View project information
- Run Project Manager Reports
 - Project Listing Report project information in the TIP as of the version selected
 - Project Authorization Report more information than the Project Listing Report. This report should be submitted to Caltrans when requesting authorization to begin a phase
 - Project Detail Report greatest amount of detail on a project
- Edit Project Air Quality Conformity information without creating a revision



FMS - Contact Information

> TIP and FMS:

Adam Crenshaw (415) 778-6794 acrenshaw@mtc.ca.gov

Karl Anderson (415) 778-6645 kanderson@mtc.ca.gov



Using FMS – Open Forum

> Questions

> Comments

Suggestions

